



AmpliFund 



Grant Maker Pre-Award Core Series

**Application Review, Workflow Configuration,
Testing**

Grant Maker Pre-Award Core Series

- **Training 1:** AmpliFund & Illinois System Integrations
- **Training 2:** Pre-Award – Master Data, Fund, Opportunity
- **Training 3:** Pre-Award – Application Configuration
- **Training 4:** Pre-Award – Scoring/Reviewer Field Set-up & Application Testing
- **Training 5:** Pre-Award – Application Review, Workflow Configuration, Testing



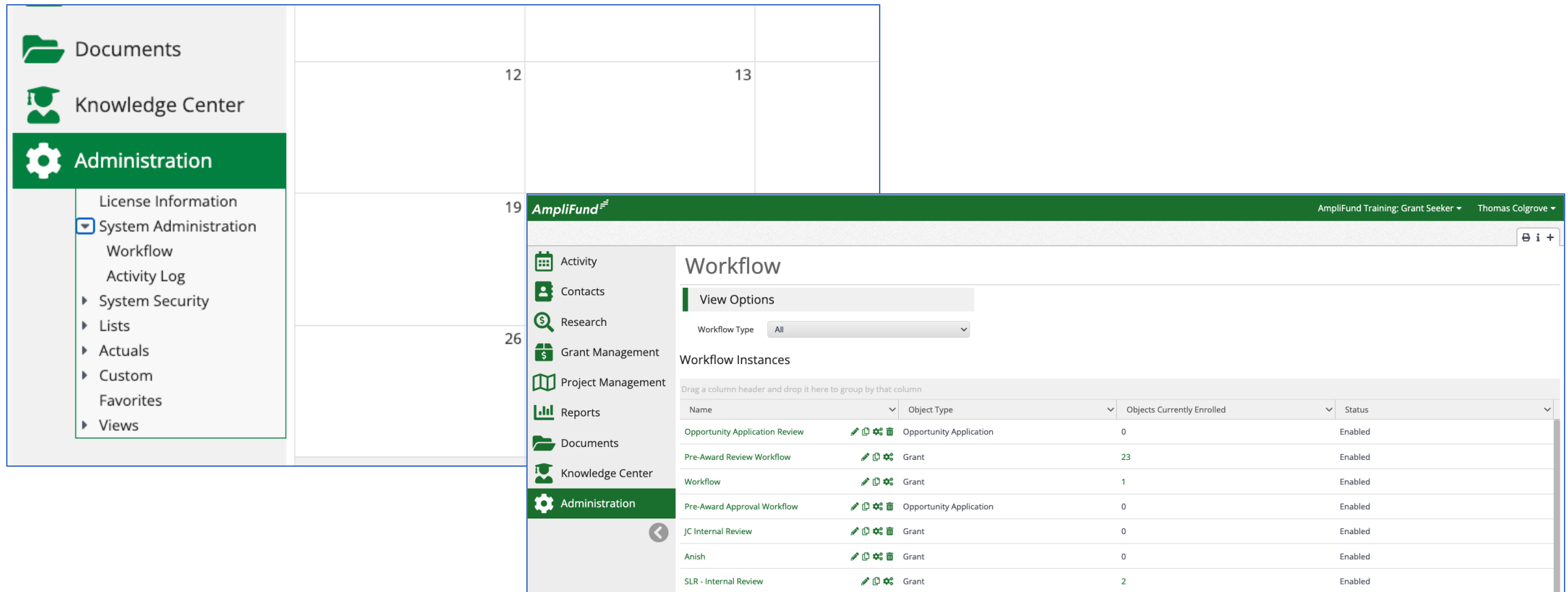
Agenda

- Configure Workflow
- Move Applications Through Workflow
- Score Applications
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer

Application Workflow

Access Workflows

- Click on Administration > System Administration > Workflows.



The screenshot shows the AmpliFund interface. On the left is a navigation menu with the following items: Documents, Knowledge Center, and Administration (highlighted in green). Under Administration, there is a sub-menu with: License Information, System Administration (highlighted with a blue checkmark), Workflow, Activity Log, System Security, Lists, Actuals, Custom, Favorites, and Views. The main content area displays the 'Workflow' page. At the top of this page is a header bar with the AmpliFund logo, 'AmpliFund Training: Grant Seeker', and 'Thomas Colgrove'. Below the header is a 'View Options' section with a 'Workflow Type' dropdown set to 'All'. The main section is titled 'Workflow Instances' and contains a table with the following data:

Name	Object Type	Objects Currently Enrolled	Status
Opportunity Application Review	Opportunity Application	0	Enabled
Pre-Award Review Workflow	Grant	23	Enabled
Workflow	Grant	1	Enabled
Pre-Award Approval Workflow	Opportunity Application	0	Enabled
JC Internal Review	Grant	0	Enabled
Anish	Grant	0	Enabled
SLR - Internal Review	Grant	2	Enabled

Edit Workflows

- Click on the Workflow Name to access the Workflow details.
- Click on the pencil edit icon to edit the Workflow details.
- Click on the paper icon to copy the Workflow.
- Click on the gear icon to edit the Workflow Queue's and Action Items.
- Click on the trashcan icon to delete the Workflow.

AmpliFund Training: Grant Seeker Thomas Colgrove

Workflow

View Options

Workflow Type: All

Workflow Instances

Drag a column header and drop it here to group by that column

Name	Object Type	Objects Currently Enrolled	Status
Opportunity Application Review	Opportunity Application	0	Enabled
Pre-Award Review Workflow	Grant	23	Enabled
Workflow	Grant	1	Enabled
Pre-Award Approval Workflow	Opportunity Application	0	Enabled
JC Internal Review	Grant	0	Enabled
Anish	Grant	0	Enabled
SLR - Internal Review	Grant	2	Enabled

AmpliFund Corporate Presentation

Create Workflows

- Click on the + icon on the top right of the screen.

The screenshot shows the AmpliFund web application interface. At the top, a green header bar contains the AmpliFund logo on the left and user information 'AmpliFund Training: Grant Seeker' and 'Thomas Colgrove' on the right. Below the header is a navigation sidebar on the left with icons and labels for Activity, Contacts, Research, Grant Management, Project Management, Reports, Documents, Knowledge Center, and Administration (which is highlighted in green). The main content area is titled 'Workflow' and includes a 'View Options' button and a 'Workflow Type' dropdown menu set to 'All'. Below this is a section titled 'Workflow Instances' with a table. The table has a header row with columns: Name, Object Type, Objects Currently Enrolled, and Status. Below the header is a row of icons and a text prompt: 'Drag a column header and drop it here to group by that column'. The table contains six rows of workflow instances, each with a list of icons (edit, copy, settings, delete) to its left.

Name	Object Type	Objects Currently Enrolled	Status
Opportunity Application Review	Opportunity Application	0	Enabled
Pre-Award Review Workflow	Grant	23	Enabled
Workflow	Grant	1	Enabled
Pre-Award Approval Workflow	Opportunity Application	0	Enabled
JC Internal Review	Grant	0	Enabled
Anish	Grant	0	Enabled

Workflow Details

- Select the Object Type.
 - Grant – Grants and Awards.
 - Opportunity – Applications.
- Enter the Name.
- Add a Description (Optional).

Workflow Details



Object Type*

Grant

Name*

ABC Org - Grant Application

Description



Workflow Notifications

- Select Action Alerts.
 - Yes or No.
- If Yes, select Days Since Last Action.
 - If a record is stalled for x days the users below will be notified.
- If Yes, select the Users to be Notified.
- Click Save on the bottom right of the screen.

The screenshot shows a web form titled "Notifications" with a green header bar. The form contains the following fields:

- Action Alerts:** A dropdown menu with "Yes" selected.
- Days Since Last Action:** A dropdown menu with "7" selected.
- Users:** A text input field containing "Judy Test" with a magnifying glass icon to its right, followed by an "Add" button.
- Current Users:** A section header for a list of users.

A callout box on the right side of the form highlights the "Save" (green button) and "Cancel" (grey button) buttons located at the bottom right of the interface.

Add Workflow Queues

- Click the + icon next to Add Workflow Queue.
 - Enter the Name.
 - Add a Description (Optional).
 - Select Users (Must click Add next to User field).
 - Any Users assigned at the Queue level have access to all Action Items within the Queue.
 - Click Save on the bottom right of the screen.

ABC Org - Grant Application

Workflow Queues

Add Workflow Queue +

▶ ABC Org - Grant Application Initial Queue  +  

New Queue

Workflow Queue Details

Name*

Description

User Permissions

User 

Current Users

Opportunity Application Workflow Consideration

- Opportunity Application Workflow Queues have a Change Submission Status. The Status affects the Application. For example, when configuring the Award Applicant Queue an agency would set the Status as Approved. In some instances, a Status Change triggers an autogenerated system notification to the Applicant.
 - No Change
 - Not Applicable
 - Withdrawn
 - Reopened
 - Rejected
 - Approved
 - Submitted
 - Unsubmitted
 - Saved

New Queue

Workflow Queue Detail

Name*

Description

Change Submission Status

Saved
Unsubmitted
Submitted
Approved
Rejected
Reopened
Withdrawn
Not Applicable
✓ No Change

User Permissions

User Search for users... Add

Current Users

Save Cancel

View, Edit, Delete Workflow Queues

- Click on the Workflow Queue to view the details.
- Click on the pencil edit icon to edit the details.
- Click on the trashcan icon to delete the Queue.

ABC Org - Grant Application Initial Queue

Workflow Queue Details

Name





ABC Org - Grant Application Initial Queue

Description

User Permissions

Current Users

Add Workflow Queue +

▶ ABC Org - Grant Application Initial Queue    

ABC Org - Grant Application Initial Queue

Workflow Queue Details

Name*

ABC Org - Grant Application Initial Queue

Description

User Permissions

User

Search for users...

Q

Add

Current Users

Save

Cancel








Add Workflow Action Items

- Click on the carrot dropdown to the left of Queue to see all Action Items within the Queue.
- Click on the + Icon next to the Queue
 - Enter the Name.
 - Add a Description (Optional).

ABC Org - Grant Application

Workflow Queues

Add Workflow Queue +

- ▼ ABC Org - Grant Application Initial Queue  +  
- ✓ ▲ ABC Org - Grant Application Remove from workflow  
- ▶ Test +  

Workflow Action Details

Name*

Description

Action Type Add Attachment ▼

Add Workflow Action Items

- Select the Action Type.
 - Select Destination Queue if Send to Queue Action Type
- Select Users (Must click Add next to User field).
 - Any Users assigned at the Action Item level only have access to that Action Item.
- Click Save on the bottom right of the screen.

Workflow Action Details

Name*

Description

Action Type

Add Attachment

User Permissions

User

Search for users...

Add

Current Users

Save

Cancel








Add Workflow Action Items

- Click on the carrot dropdown to the left of Queue to see all Action Items within the Queue.
- Click on the + Icon next to the Queue
 - Enter the Name.
 - Add a Description (Optional).

ABC Org - Grant Application

Workflow Queues

Add Workflow Queue +

- ▼ ABC Org - Grant Application Initial Queue  +  
- ✓ ▲ ABC Org - Grant Application Remove from workflow  
- ▶ Test +  

Workflow Action Details

Name*

Description

Action Type Add Attachment ▼

Workflow Action Types

Opportunity Workflow

- Add Attachment
- Complete Task
- Send to Queue
- Remove from Workflow
- Award Applicant
- Create Related Item

Grant Workflow

- Add Attachment
- Complete Task
- Send to Queue
- Remove from Workflow

Workflow Action Details

Name*

Description

Action Type

- ✓ Add Attachment
- Award Applicant
- Complete Task
- Create Related Item
- Remove From Workflow
- Send To Queue

User Permissions

User

Workflow Action Details

Name*

Description

Action Type

- ✓ Add Attachment
- Complete Task
- Remove From Workflow
- Send To Queue

User Permissions

User

Edit Workflows

- Click on Administration > System Administration > Workflow.
- Click on the pencil edit icon to edit the Workflow Details.
- Click on the gear icon to edit the workflow Queues.
- Click on the trashcan icon to delete.

Workflow

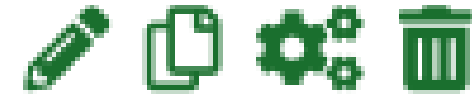
View Options

Workflow Type All

Workflow Instances

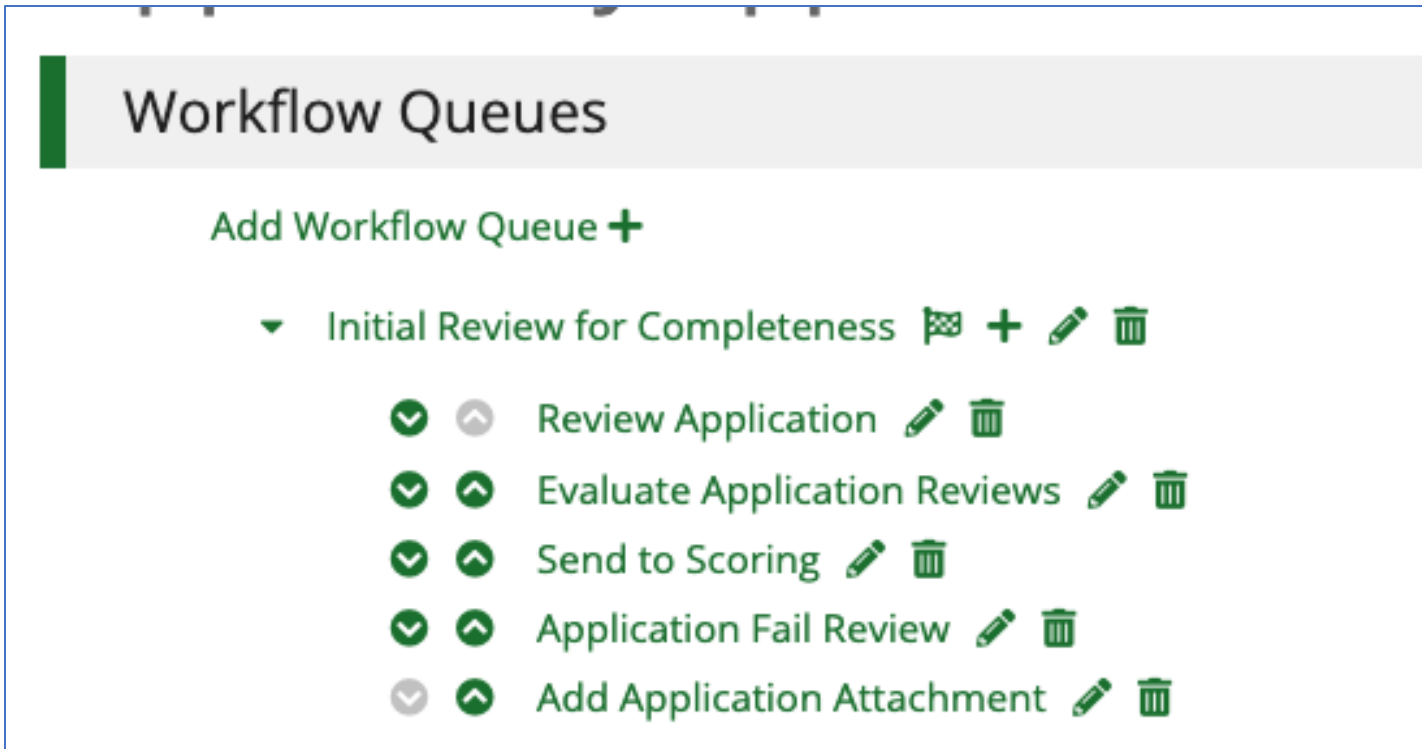
Drag a column header and drop it here to group by that column

Name	Object Type
Opportunity Application Review	Opportunity Application
Pre-Award Review Workflow	Grant



Edit Workflow Queues and Action Items

- Click on the pencil icon to edit.
- Click on the trashcan icon to delete.
- For Action Items only, click on the arrows to reorder.



Move Applications Through Workflow

Add Workflow to Opportunity

- Must have an Opportunity in AmpliFund.
- From the Opportunity Details page, click on Configuration > Workflow Settings.
- Choose the appropriate Opportunity Workflow.
- Click Add.
- Refer to slides 9 and 10 for editing Workflows.

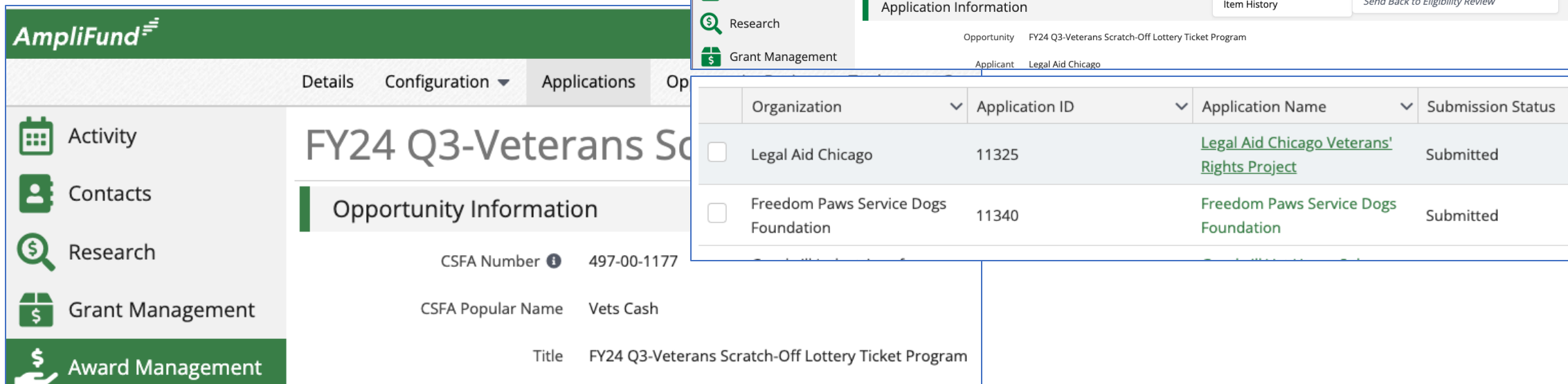
The image displays two screenshots of the AmpliFund web application interface, illustrating the process of adding a workflow to an opportunity.

Left Screenshot: Shows the 'Opportunity Details' page for the 'State Court Improvement Program'. The 'Configuration' dropdown menu is open, and 'Workflow Settings' is selected. The left sidebar shows navigation options: Activity, Contacts, Research, Grant Management, Award Management (highlighted), and Fund Management.

Right Screenshot: Shows the 'Workflow Settings' page for the 'State Court Improvement Program - Work'. The 'Choose Workflow' dropdown is set to 'HC opportunity', and the 'Add' button is visible. Below, the 'Workflow Details' section shows the 'HC opportunity' workflow with a list of 'Workflow Queues' including 'Application', 'Approval', and 'HC opportunity Remove from workflow'.

Enroll Application into Workflow

- From the Opportunity Details page, click on Applications.
- Land on a list of all Application submitted.
- Select the appropriate Application.
- Click on Workflow



Organization	Application ID	Application Name	Submission Status
<input type="checkbox"/> Legal Aid Chicago	11325	Legal Aid Chicago Veterans' Rights Project	Submitted
<input type="checkbox"/> Freedom Paws Service Dogs Foundation	11340	Freedom Paws Service Dogs Foundation	Submitted

Opportunity: FY24 Q3-Veterans Scratch-Off Lottery Ticket Program
Applicant: Legal Aid Chicago

CSFA Number: 497-00-1177
CSFA Popular Name: Vets Cash
Title: FY24 Q3-Veterans Scratch-Off Lottery Ticket Program

Enroll Grant into Workflow



- Access the appropriate Grant.
- Click on Grant Workflow.
- Add the Grant to the appropriate Workflow.
- Confirm.

AmpliFund

Department of Veterans' Affairs

DetailsAnalyticsPre-AwardPost-AwardToolsGrant WorkflowCustom

Activity

Contacts

Research

Grant Management

Award Management

Fund Management

FY23 Q4 - A Safe Haven Foun

Award Information and Status

Name	FY23 Q4 - A Safe Haven Foundation
Recipient Name	A Safe Haven Foundation
Recipient Vendor ID	9000972136
Recipient Award Name	FY23 Q4 - A Safe Haven Foundation

Add To Workflow

Workflow Task Completion

Item History

Attachments

Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract

IDVA Payment Request Workflow

Add to Workflow

Workflow Item

NameFY23 Q4 - A Safe Haven Foundation

Workflow Details

NameVeterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract

Description

Created Date2/15/2023

Confirm

Cancel

Move Records Through Workflow



- From the Workflow tab click on the appropriate Action Item.

AmpliFund

Details Analytics Pre-Award Post-Award Tools Grant Workflow Custom

Activity

Contacts

Research

Grant Management

Award Management

FY23 Q4 - A Safe Haven Foun

Award Information and Status

Name

FY23 Q4 - A Safe Haven Foundation

Recipient Name

A Safe Haven Foundation

Recipient Vendor ID

9000972136

Recipient Award Name

FY23 Q4 - A Safe Haven Foundation

Available Actions

Workflow Task Completion

Item History

Attachments

Generate UGA in AmpliFund

Upload Signed UGA

Send to Fiscal Review

Generate UGA in AmpliFund

FY23 Q4 - A Safe Haven Foundation

Task Details

Name

Generate UGA in AmpliFund

Description

Completion Details

Is Complete

No

Comments

Confirm

Cancel

AmpliFund Corporate Presentation

Task Completion



- Click on the Workflow or Grant Workflow > Workflow Task Completion to see all completed Task Action Types.

AmpliFund

Details Analytics Pre-Award Post-Award Tools Grant Workflow Custom

Activity

Contacts

Research

Grant Management

Award Management

FY23 Q4 - A Safe Haven Foundation

Award Information and Status

Name

FY23 Q4 - A Safe Haven Foundation

Recipient Name

A Safe Haven Foundation

Recipient Vendor ID

9000972136

Add To Workflow

Workflow Task Completion

Item History

Attachments

AmpliFund

Details Analytics Pre-Award Post-Award Tools Grant Workflow

Activity

Contacts

Research

Grant Management

Award Management

FY23 Q4 - A Safe Haven Foundation

Drag a column header and drop it here to group by that column

Name

Workflow Queue

Activate Award

Generate UGA in AmpliFund

AmpliFund Corporate Presentation

Item History



- Click on the Workflow or Grant Workflow > Item History to see all completed items.

AmpliFund

Details Analytics Pre-Award Post-Award Tools Grant Workflow Custom

Activity

Contacts

Research

Grant Management

FY23 Q4 - A Safe Haven Foun

Award Information and Status

Name

FY23 Q4 - A Safe Haven Foundation

Recipient Name

A Safe Haven Foundation

Add To Workflow

Workflow Task Completion

Item History

Attachments

Drag a column header and drop it here to group by that column

Workflow Queue	Workflow Action	Text	User	Created Date
Create Contract	Exit Workflow	'FY23 Q4 - A Safe Haven Foundation' (2983) - Exited Workflow Instance 'Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract' (411)	tcolgrove@amplifund.com	5/21/2024 10:33 AM
Fiscal Review	Send to Create Contract	'FY23 Q4 - A Safe Haven Foundation' (2983) - Sent to Queue 'Create Contract' (5314)	tcolgrove@amplifund.com	5/21/2024 10:32 AM
Generate Uniform Grant Agreement	Send to Fiscal Review	'FY23 Q4 - A Safe Haven Foundation' (2983) - Sent to Queue 'Fiscal Review' (4029)	tcolgrove@amplifund.com	5/21/2024 10:32 AM
Generate Uniform Grant Agreement	Exit Workflow	'FY23 Q4 - A Safe Haven Foundation' (2983) - Added to Workflow Instance 'Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract' (411)	tcolgrove@amplifund.com	5/21/2024 10:31 AM

Access Workflows



- Click on Administration > System Administration > Workflows.
- Click on the number in the Objects Currently Enrolled.

Documents

Knowledge Center

Administration

- License Information
- System Administration
 - Workflow
 - Activity Log
- System Security
- Lists
- Actuals
- Custom
- Favorites
- Views

	12	13
	19	20

AmpliFund

Activity

Contacts

Research

Grant Management

Project Management

Reports

Documents

Knowledge Center

Administration

Workflow

View Options

Workflow Type: All

Workflow Instances

Name	Object Type	Objects Currently Enrolled	Enabled
Opportunity Application Review	Opportunity Application	0	
Pre-Award Review Workflow	Grant	23	Enabled
Workflow	Grant	1	Enabled
Pre-Award Approval Workflow	Opportunity Application	0	Enabled
JC Internal Review	Grant	0	Enabled
Anish	Grant	0	Enabled
SLR - Internal Review	Grant	2	Enabled

Veterans Scratch-Off Lottery Ticket Program - Award/UGA/Contract - Enrolled Objects

Grant Name	Date Entered	Current Queue
FY23 Q4 - Erase PTSD Now	12/29/2023	Activate Award
FY23 Q4 - National Able Network, Inc.	12/29/2023	Activate Award
FY24 Q1-Volunteers of America of Illinois	03/22/2024	Activate Award
FY24 Q1-Regional Housing & Supportive Services, Inc.	01/16/2024	Activate Award
Safer Foundation	03/22/2024	Activate Award
Revelation Golf	03/22/2024	Activate Award
FY24 Q2-Fishing for Freedom	03/19/2024	Activate Award
FY24 Q2- Renewed Inc.	03/22/2024	Activate Award
FY24 Q2- Citizens Helping Citizens NFP	03/28/2024	Activate Award
FY24 Q2- Guardian Corps of America	04/04/2024	Activate Award
FY24 Q2- Code Platoon	03/28/2024	Activate Award

Access Workflow Actions from the Activity Center

- Click on Activity > Workflow Actions to see all objects enrolled in Workflow Queue's and Action Items you are responsible for.

AmpliFund

Shannon Shymansky

Activity

Calendar

Events

Message Center

Tasks

Workflow Actions

Achievements

Expenses

Timesheets

Timesheet Approvals

Payment Request Approvals

Tracking Periods

Reporting Periods

Views

Reports

Documents

Drag a column header and drop it here to group by that column

Name	Current Queue	Type
FY23 Q4 - Erase PTSD Now	Activate Award	Grant
FY23 Q4 - National Able Network, Inc.	Activate Award	Grant
FY24 Q1-Volunteers of America of Illinois	Activate Award	Grant
FY24 Q1-Regional Housing & Supportive Services, Inc.	Activate Award	Grant
Safer Foundation	Activate Award	Grant
Revelation Golf	Activate Award	Grant
FY24 Q2-Fishing for Freedom	Activate Award	Grant
FY24 Q2- Renewed Inc.	Activate Award	Grant
FY24 Q2- Citizens Helping Citizens NFP	Activate Award	Grant

Score Applications

Score Applications – Workflow Action Item

- Select the Score Application Action Item via the Workflow tab on the Application.
- Must configure a Create Related Item – Application From Action Item Type in the Workflow.

New Action

Workflow Action Details

Name*

Description

Action Type

Create Related Item

Related Item Type

Application Form

User Permissions

User

Search for users...

Add

Current Users

Save

Cancel

AmpliFund

Scorecard

Tools

Workflow

Available Actions

Workflow Task Completion

Item History

Remove from Workflow

Score Application

ker Core Series - Pre-Award

g: Grant Maker

Score Application Forms

- Score and add comments to each Application as needed.
- The Scored By You status should be Yes for each Application.

Application Forms	
Name	Scored By You
Project Overview	No
June 11 Grant Maker Core Series Form Template	No
<div><div><div>⏪</div><div>⏴</div><div>1</div><div>⏵</div><div>⏩</div></div><div>25 items per page</div></div>	

Review Budget

- Click the Comment tab next to the budget.
- Click on the Line Item for more details.
- Add comments.
- Click Submit Comments on the bottom right of the screen.

Total Proposed Budget by Category

Category	Grant Funded	Non-Grant Funded	Total Budgeted
Equipment	\$100,000.00	\$0.00	\$100,000.00
Test Thomas	\$0.00	\$10,000.00	\$10,000.00
Total Expense Budget Cost	\$100,000.00	\$10,000.00	\$110,000.00

Comment

Proposed Budget

Expense Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
Equipment	\$100,000.00	\$0.00	\$100,000.00
Test	\$100,000.00	\$0.00	\$100,000.00
Test Thomas	\$0.00	\$10,000.00	\$10,000.00
Test Thomas	\$0.00	\$10,000.00	\$10,000.00
Total Expense Budget Cost	\$100,000.00	\$10,000.00	\$110,000.00

Revenue Budget

Grant Funding

Award Requested	\$100,000.00		\$100,000.00
Subtotal	\$100,000.00		\$100,000.00

Non-Grant Funding

Cash Match		\$10,000.00	\$10,000.00
Subtotal		\$10,000.00	\$10,000.00

Total Revenue Budget Cost

Total Overall Budget Cost

(\$110,000.00)

\$0.00

Final Comments

Submit Comments

Cancel

Review Performance Plan

- Click the Comment tab next to the Performance Plan.
- Add comments.

Proposed Performance Plan

Strategy: Performance Area 1

Strategy Description: Test...

Name: Test Milestone

Goal Type: Milestone

Due Date: 6/30/2024

Description: Test

Strategy: Performance Area 2

Strategy Description: Test...

Name: Test

Goal Type: Numeric

Quantity: 24

Description: Test...

Strategy: Performance Area 3

Strategy Description:

Name: Test

Goal Type: Narrative

Narrative: Test questions...

Strategy: Other Goals

Strategy Description:

No items for strategy

Comment

Final Comments

Final Comments*

Submit Comments

Cancel

Review Attachments

- Review and download Attachments as needed.

Attachments

Logo-FullColor-hi-res

Form:

Field:

Logo-FullColor-hi-res

Form: June 11 Grant Maker Core Series Form Template

Field: [Download this document.](#)

In-Product Demo

Next Steps

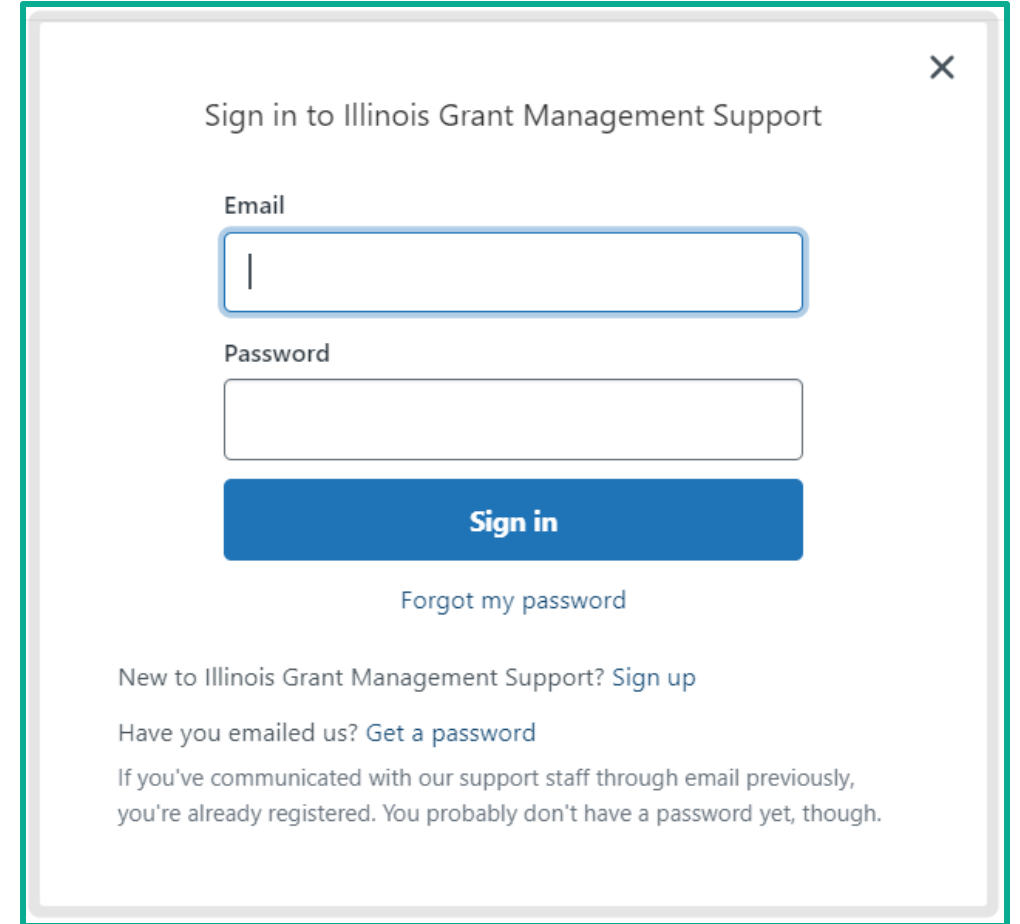
Next Steps

- Submit a Test Application.
- Configure a basic Workflow.
- Move the Test Application through the Workflow.

Customer Support

Create AmpliFund Support Account

1. Access the appropriate support site.
2. Click the **Sign up** link.
3. Enter your **full name**.
4. Enter your **email address**.
5. Complete the **I'm not a robot** check.
6. Click the **Sign up** button.
7. An email from support@zendesk.com will be sent to you via email.
8. Click the link to set your password.



The screenshot shows a sign-in window titled "Sign in to Illinois Grant Management Support" with a close button (X) in the top right corner. The form contains two input fields: "Email" and "Password". Below the "Password" field is a blue "Sign in" button. Under the button is a link that says "Forgot my password". At the bottom of the form, there are two links: "New to Illinois Grant Management Support? Sign up" and "Have you emailed us? Get a password". A paragraph of text at the very bottom states: "If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though."

AmpliFund Illinois Support Portal

Submit a support ticket:

Commercial – support@amplifund.zendesk.com.

Illinois – support@il-amplifund.zendesk.com.

Nebraska – support@ne-amplifund.zendesk.com.

Visit Support Portal:

Commercial – <https://amplifund.zendesk.com>.

Illinois – <https://il-amplifund.zendesk.com>.

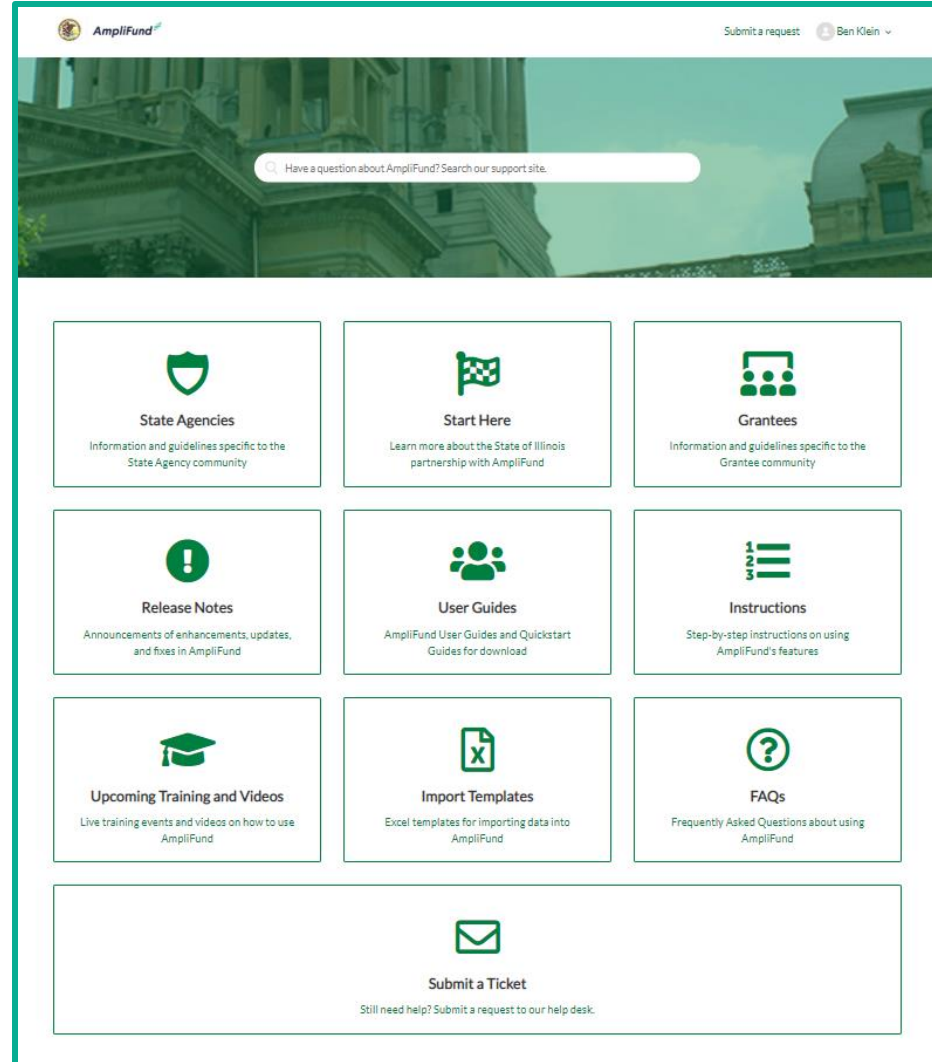
Nebraska – <https://ne-amplifund.zendesk.com>.

Production Site:

Commercial – <https://www.gotomygrants.com>.

Illinois – <https://il.amplifund.com>.

Nebraska – <https://ne.amplifund.com>.



Question & Answer